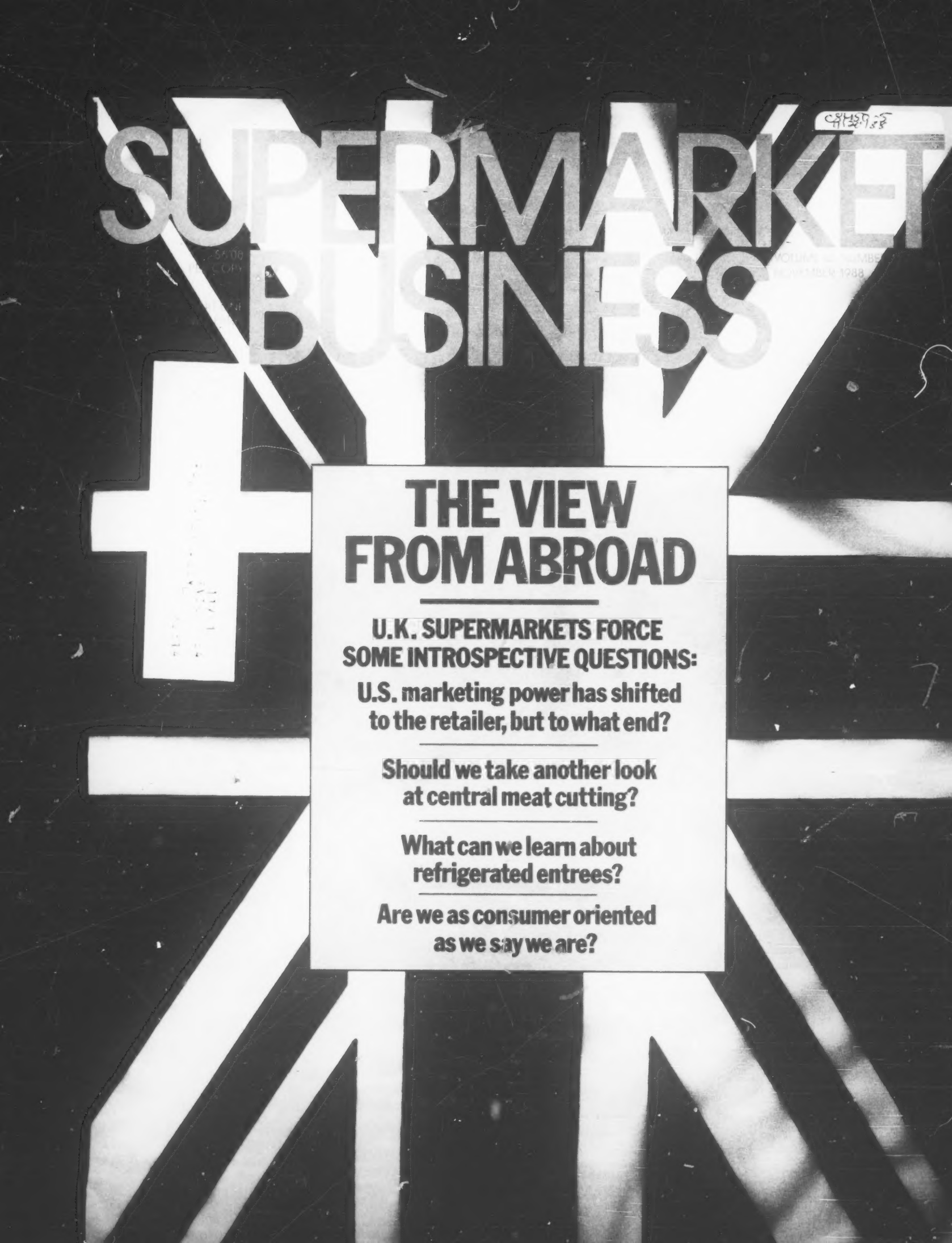

THE VIEW FROM ABROAD

U.K. SUPERMARKETS FORCE SOME INTROSPECTIVE QUESTIONS:

U.S. marketing power has shifted to the retailer, but to what end?

Should we take another look at central meat cutting?

What can we learn about refrigerated entrees?

Are we as consumer oriented as we say we are?

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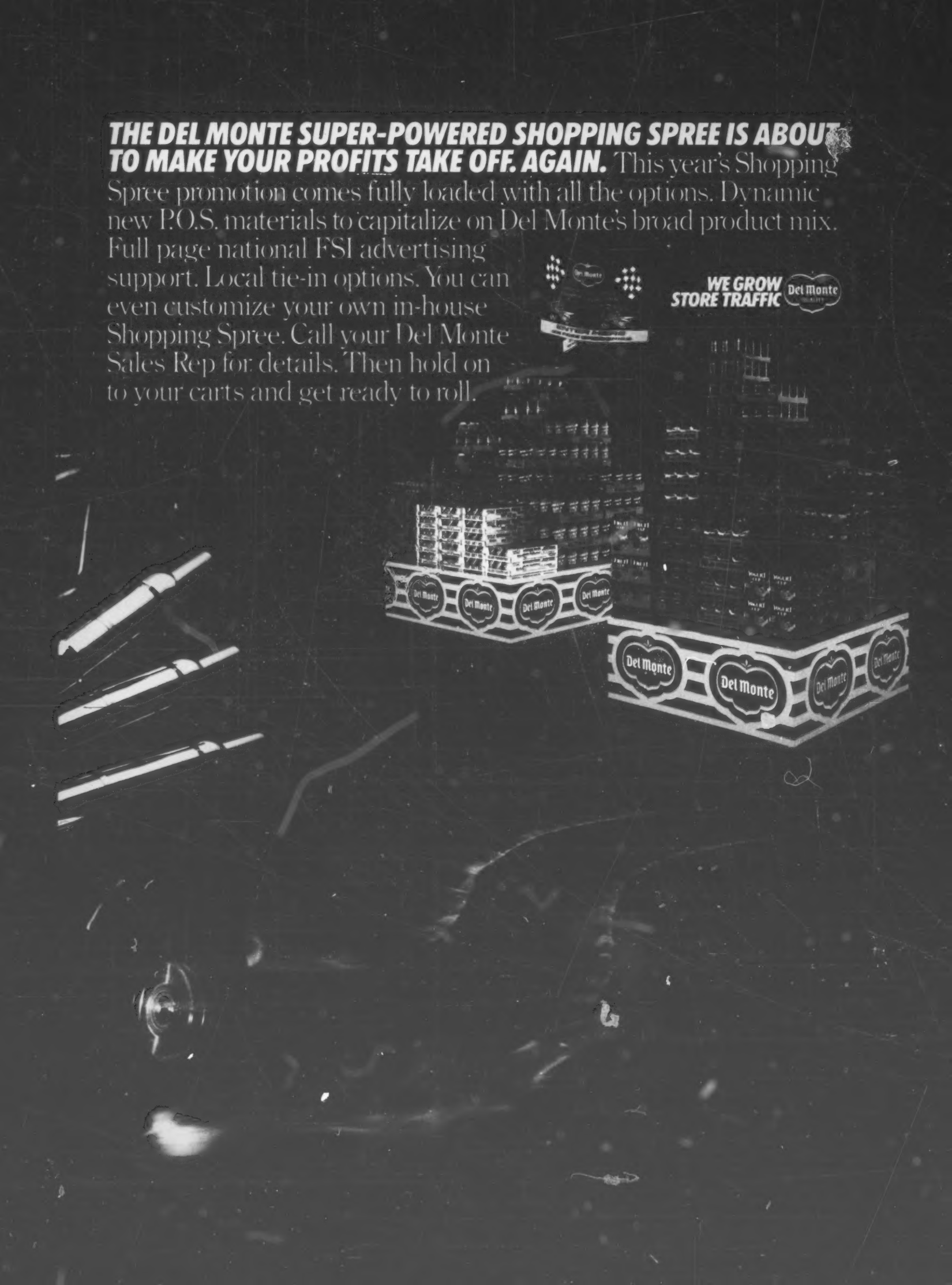
Cover Photography: Marisa Pellegrini

THE DEL MONTE SUPER-POWERED SHOPPING SPREE IS ABOUT TO MAKE YOUR PROFITS TAKE OFF. AGAIN. This year's Shopping Spree promotion comes fully loaded with all the options. Dynamic new P.O.S. materials to capitalize on Del Monte's broad product mix. Full page national FSI advertising support. Local tie-in options. You can even customize your own in-house Shopping Spree. Call your Del Monte Sales Rep for details. Then hold on to your carts and get ready to roll.



TRADE SCAN

Brown Bag Lunching Found To Be An Upscale Trend

Do the delis that you operate in upscale areas encompass a full array of ready-to-eat items in single-serve packages that can be easily brought to work for lunching or snacking? Do they also carry low-calorie items and snack foods that fall into this category? If so, they are well on their way to increasing your profits. If they don't, now would be a good time to start.

According to a new study, "The Carried Food Market," conducted by MRCA Information Services (a market research firm based in Stamford, Conn.), higher-income individuals are far more likely to brown-bag snack and lunch items than lower-income groups. What they are brown-bagging are single-serve packaged products and snack food items such as cheese, cookies, salty snacks, fruit and yogurt.

This trend truly indicates that you have an opportunity, now more than ever, to increase your deli sales in upscale areas by catering to this new brown-bagger crowd. You can start by offering them more of a variety in single-serve items, luncheon meats or snacking items, and possibly having specials on those types of foods. You may also want to hold special promotions to attract more of these brown-baggers. The possibilities are endless.

Correction

Merrill-Lynch, not Kohlberg Kravis Roberts & Co. as mentioned in last month's editorial, was involved in the Pathmark acquisition.

Saturday For Shopping... & Sunday For Advertising?

Did you know that Saturday is the most popular day for food shopping, followed by Friday? That's the scoop, according to a recent Mediamark Research study.

Nevertheless, supermarkets in different parts of the country do their advertising on different days. Retailers in Atlanta, Los Angeles, Providence and Cleveland stick to the traditional Wednesday evening/Thursday morning schedule, for example, while those in Boston, Dallas, Minneapolis and Denver aim for their audience on Sunday.

Here's how the shopping days shape up:

HOMEMAKERS	Total	Women	Men
Monday	14%	14%	15%
Tuesday	15	14	19
Wednesday	18	18	20
Thursday	19	19	18
Friday	24	24	21
Saturday	26	25	32
Sunday	12	11	19
Number (in 000s)	(97,793)	(79,236)	(18,857)

(Columns total more than 100 percent because some respondents reported two or more shopping days.)

Customer Service Ranks 2nd On Retailers' Worry List

Concerns about customer service—or the lack of it—rank high on the list of issues facing retailers. In fact, customer service falls in right behind the number one problem—increased competition—according to a survey conducted recently by Touche Ross Retail Services.

Ninety-six percent of the retailers responding to the survey said that acquiring experienced, reliable salespeople is a critical problem (51 percent) or somewhat of a problem (45 percent).

Perhaps even more frightening, 88 percent said they expect difficulties in finding qualified staffers to intensify during the next five years.

The "birth dearth" of the 1960s and '70s is having a shrinking effect on the nation's available work force, explains Harvey Braun, chairman of the Retail Services Group. The labor shortage will worsen during the next five years, he adds.

To compensate for the lack of younger workers, 24 percent of the retailers questioned said they already have a program in place for hiring retired people; another 16 percent are currently developing such a program. The larger the company in terms of annual sales, the more likely it is to implement a retiree-hiring program, the survey found.

September Contest Winners Look To SB For New Ideas

Two supermarket managers made it into our winners' circle this month, by answering all our September contest questions correctly.

Jim Gallagher, manager of a Mayfair Foodtown in Twin Rivers, N.J., says he reads SUPERMARKET BUSINESS "to get ideas, and to see what's going on around the globe," so he'll be particularly interested in this issue's international focus.

Jim has been reading the magazine for several years, but didn't start entering the contest until recently. "Several people from my company do it, so I finally decided to take the time to do it also," he says.

Jim's co-winner is Kenneth Land, co manager of a Kroger Sav-On in Myrtle Beach, S.C., who's aspiring to become a unit manager with Kroger.

Ken says he reads SUPERMARKET BUSINESS "cover to cover, because it's a well written magazine with a lot of information that helps in the everyday operations of the supermarket.

"I oversee the perishables at the front end of the store, but I read the total magazine for ideas that I can use myself, or can pass on to other managers in areas that are not my responsibility," he says.

Winners of this month's SUPERMARKET BUSINESS contest will receive portable color TVs.

The November contest is on page 73, preceded by the list of correct entries for September, which begins on page 72.

New Zealand Supermarket Re-oranging Record

As we all know by now, Andy Warhol said that, in the future, everyone will be famous for 15 minutes. And, since he's dead, this must be the future. They seem to think so in New Zealand. In fact, they seem to have built on Warhol's theory, concluding that as a conglomeration of individuals, a country deserves to be famous for 15 minutes per year. So perhaps something that happened at The Big Fresh Food Company store in Auckland might be explained as an attempt by New Zealand to break back onto the world scene. Big Fresh has imported 220,000 Valencia oranges from Australia to set the record for a citrus display. Big Fresh is attempting to contact Dole in Florida to verify the record.

BY CAROL FENSHOLT

At day's end, central London's professional crowd flocks to J. Sainsbury's for a meal-to-go on the way home from work.

MINDING THE STORE... & THE MARKETING PROCESS

Prepared sandwiches and snacks get eye in high-traffic location, an aisle end.

What's going on here?

Last month, for the third straight year, the J. Sainsbury Company was crowned Great Britain's Number One Marketer.

In a survey commissioned by British *Marketing Week* Magazine, the U.K.'s largest supermarket chain surpassed not only the impeccable British Airways (No. 3), but edged out Lever Brothers (No. 2) and Procter & Gamble (No. 6).

U.S. manufacturers from the old brand management school would find it astonishing: "A company that operates supermarkets — those product delivery pipelines that we push and consumers pull the goods through — tapped as the nation's top *marketing* maven?"

Well, why not? In the U.K., at Sainsbury and elsewhere, the lines of distinction between retailers and suppliers are much less sharply drawn.

Hence, marketing is a more organic process ... and supermarkets are indeed *super marketers*. As actively involved in new product concepts and development as any major manufacturer, British retailers have long exploited their natural advantage to a degree that the American retailer never has.

For more than 25 years, Sainsbury has been renowned for the variety and quality of its own house-brand products.

J. Sainsbury, like other U.K. retailers, has long seen itself as much more than the far end of the product delivery pipeline.

The country's top marketers seem to agree.

Sainsbury's top-quality own-label merchandise includes seasoned ready-to-heat poultry, and a wide variety of house-label wines and champagnes.

THE TOP 10 U.K. RETAILERS*
In Billions of Pounds
(all classes of trade)

Company	Volume
Sainsbury (incl. Homebase; excl. Savacentre)	4.34
Marks & Spencer	4.17
Tesco	4.12
Dee Corp. (Gateway, Wellworth, Medicare)	3.77
Argyll (incl. Mojo, Snow King)	3.23
Asda (incl. MFI and Associated Dairies)	2.72
Woolworth (incl. Comet, B&Q, Superdrug, Charlie Brown's, Kidstore)	2.17
Boots (incl. Children's World)	1.98
John Lewis Group (incl. Waitrose)	1.50
Sears Group (incl. Freemans, Lewis's)	1.48

*Financial years ending January-April, 1988
SOURCE: Corporate Intelligence Group

U.K. FOOD RETAILER/RELATIVE VOLUME PERFORMANCE (1980 = 100)

	Chains	Small Grocers	Co-ops	Butchers	Greengrocers
1980	100	100	100	100	100
1981	106	96	96	96	100
1982	114	92	92	90	98
1983	123	84	92	94	103
1984	130	77	90	97	104
1985	140	77	90	95	106
1986	149	76	90	93	103
1987	159	76	92	93	102

SOURCE: Corporate Intelligence Group

GROCERY MARKET SHARES OF U.K. SUPERMARKET COMPANIES (In Percent)

	83/84	84/85	85/86	86/87	87/88
Tesco	11.3	12.0	12.5	13.1	14.0
J. Sainsbury	11.7	12.3	12.8	13.5	13.9
Dee	4.2	7.7	12.2	11.1	11.5
Argyll				9.6	10.7
(Presto)	(5.0)	(5.7)	(5.7)	(5.7)	(6.1)
(Safeway)	(3.0)	(3.2)	(3.6)	(3.9)	(4.6)
Asda	7.2	7.4	7.5	7.4	7.6
Co-op	13.8	13.3	13.3	12.4	12.1

SOURCE: Verdict Research

SAINSBURY FACTS & FIGURES...

Headquarters:	Stamford House, Stamford Street, London, SE1 9LL
Number of U.K. Supermarkets:	279
New U.K. Supermarkets Planned (88-89):	28
Average U.K. Supermarket Size:	19,540
Average New U.K. Supermarket Size:	30,600
U.S. Operations:	Shaw's Supermarkets (Brockton, Mass.), 60 supermarkets in Maine, New Hampshire, and Massachusetts
Other Retail Divisions:	Homebase (D.I.Y./garden stores), SavaCentre (food/GM hypermarkets).
Total Company Volume:	5 Billion Pounds ($8.4 Billion*)
Sainsbury's Supermarket Volume:	4.4 Billion Pounds ($7.4 Billion*)
Shaw's Volume:	451 Million Pounds ($762 Million*)
Pre-Tax Profit (U.K.):	301.6 Million Pounds ($510 Million)
Pre-Tax Profit (U.S.):	18.5 Million Pounds ($36.1 Million)
Net Margin (U.K.):	6.62%
Chairman:	Sir John Sainsbury
Joint Presidents:	Lord Sainsbury of Drury Lane, Sir Robert Sainsbury

*Results translated at an average exchange rate of 1 pound at $1.69, adjusted over the 52 weeks through March 19, 1988.

Closest to consumer

The U.K. approach seems to make a lot of good sense: After all, the supermarket is closer to the consumer than anyone. Like nobody else, it can get consumer input and feedback instantly ... if it wants to.

In the U.K., it does.

Tesco, Sainsbury's largest competitor, might well now be an acronym for "Test Company," so aggressive has its consumer research become.

Last year, 100,000 consumers participated in the evaluation of 22,000 products ... both the company's own label and manufacturers' brands. The locus of the focus groups and other assessment processes was the network of consumer kitchens within Tesco stores across the U.K.

The result: a veritable upwelling of creative new products and service ideas. Tesco introduced 300 new refrigerated entrees and side dishes alone in the past year ... along with a new low-based refrigerated cabinet of its own design to accommodate them.

At J. Sainsbury, its own brands account for 55 percent of total sales. Among other things, it's the largest wine retailer in the U.K., merchandising 184 house labels as well as renowned wines from around the world.

Sainsbury's "intrapreneurialism" even extends to *books* about wine. And, as in so many other product lines, the quality is exceptional: Commissioned and published by the company, its *Book of Wine* by enology expert Oz Clarke received Britain's Deinhard & *Wine Magazine* Book of the Year Award.

Other top-quality Sainsbury brands include children's cereals — designed and packaged with the same level of marketing snap, crackle & pop as the best U.S. brand — a line of cosmetics, and even "CFC (chlorofluorocarbon)-Free" hair styling spray ... produced in response to its customers' environmental concerns.

Buyers are marketers

All this product development activity calls for a buying department — though that's hardly the best word to describe it — about 50 percent larger than a U.S. supermarket doing equivalent volume.

That's necessary because "Our buying departments are, in reality, marketing depart-

EDIFICE COMPLEX:

The Social Impact Of U.K. Supermarket Design

"We're not selling stores — we're selling *merchandise*" has been an oft-repeated defense of inexcusable retail edifices.

Ah, but sometimes one must sell the building first ... to the planning board. In England especially, land is at a premium and its commercial use is tightly regulated by both law and strict local authority.

And today, it's not just the social impact, the commercial impact and the environment impact of a proposed business development that are scrutinized—it's the aesthetic impact, as well.

Indeed, in the U.K. national aesthetic awareness has been recently heightened by no less a personage than Prince Charles himself, whose commitment to preserving and perpetuating Britain's rich architectural heritage has become a cause celebre notorious among British developers.

Consequently, Fleet Street as well as city fathers are now out to protect the public from structural pollution.

Recently, award-winning feature writer Lynda Lee-Potter of the *London Daily Mail* praised Sainsbury for its aesthetic sensibilities.

Lee-Potter's opinion piece asserts that the beauty of its buildings strongly influences a society's behavior.

Hers is a sentiment that, by the recent profusion of supermarket roof ridges, domestic-like dormer windows, turrets, clock towers and weathervanes, is shared by more and more food retailers in the United Kingdom ... or is, more and more, forced on them by their local planning boards:

'Curse Of The Ugliness That Breeds Junk Lives'

My local Sainsbury's in Dorset has just been relocated and rebuilt in brick. It looks rather like a mellow barn that will only get more beautiful with age.

There is a covered walkway under a curving canopied entrance surrounded by trees. The forecourt has been landscaped and paved with seats where the old can sit, young mothers chat, and children safely play.

Last Saturday afternoon around 4 p.m., there wasn't an empty crisp bag or discarded Coke can to be seen. Because who would defile surroundings designed with such loving care, where the ordinary task of shopping has been turned into a pleasure?

I only pray that slowly — and nearly too late — we're beginning to acknowledge that everyday surroundings affect not only our spirits but also our behaviour.

Put people in shoddy concrete tower blocks and they'll behave like savages. Dump them in wastelands like Skelmersdale, and the weakest will be defeated.

Nobody ever felt enriched by reinforced concrete; there is no inspiration in the covered noisy hell of an Arndale Centre.

Nobody's soul ever soared in Birmingham's Bull Ring, or the Moat House International, which must be one of the ghastliest buildings in England.

In a society where many daren't venture out at night ... the blame has rightly been put on parents and teachers.

But it also ought to be laid at the door of a body of architects who treated the population as though they were stupid, blind and could be herded away in high-rise cells.

Of course you get graffiti and filth when people are dehumanised by ugliness. Create a jerry-built world and you'll get jerry-built behaviour...

Continuity is important in all our lives, a conviction that buildings will be there long after we've gone. But how can you get that from monstrosities that look as though they've been erected by those who hate the human race?

...Our architecture is of fundamental importance to our quality of living in a way that has never been fully expressed.

And I only wish more commercial organizations cared for our welfare, our happiness, and our souls.

ments," says R.A. Clark of J. Sainsbury.

At Sainsbury, as mentioned in another part of this section, a primary responsibility of company buyers is not buying *product*, but buying *product development* expertise and services.

For although better than half of its total sales come from its house brands, Sainsbury — like other U.K. retailers — has so far avoided Horseheads, N.Y.-like forays into the manufacturing business.

Instead, it prefers to work with manufacturers, establishing quality standards and then jointly fine tuning the product in consumer tests.

Indeed, it's the diametric opposite of what typically goes on in the U.S., where the manufacturer develops and markets a new product ... and the retailer, if he likes it, "knocks it off" by producing a less-costly version under his own, or a no-frills, label.

As one British retail executive says, "Here, retailers have captured the product development lead — we are in the chief role. Here, it's the manufacturer who has to second-guess it."

In annual retailer-manufacturer planning meetings, the question is not so much, "How much will we sell ... or will you buy?" but: "*What* will we sell, how big is the market and *what do we need to develop?*"

Computer systems provide stores with timely operations control.

Fewer new products

One result of the U.K. supermarket product development process is that fewer new products enter the pipeline. This, British operators contend, is because their approach is to develop *one* product very carefully, rather than throw 10 at the wall and hope that one sticks.

The store operator does not rely on the manufacturer's research to tell him how a product is likely to perform. "We do our own market research," one U.K. executive says. "We have a huge data base."

Partly because it doesn't have the U.S. operator's torrential flood of new products to find homes for on the shelf, Sainsbury super stores carry some 10,500 items — just about half of what the typical U.S. super store carries.

In U.K. supermarkets, the failure rate of new products is lower, and there's less adding and dropping of them. Having been initiated by known consumer needs and tested by the stores among their own customers, the new product goes on the shelf with a better chance of success.

When it does fail, Sainsbury, for one, knows it soon enough. Having moved aggressively into scanning, it gets immediate feedback from the front end as well as from customers themselves.

Currently, more than 80 percent of Sainsbury's sales are rung up by scanning checkouts.

The company's acquisition of Shaw's (Brockton, Mass.) has helped advance and refine its technological edge.

Having started early to experiment with everything from merchandising applications of scan data to semi-automated supervised reordering, Shaw's has been able to provide Sainsbury with additional,

Continued on page 50

ALL IN THE FAMILY...

A controlled flow of internally generated new products is the lifeblood of today's more and more competitive British supermarket business.

Both Tesco and Sainsbury are continually testing, refining and introducing "own-label" items ... although both companies still rely on manufacturers to make the products.

Tesco introduced some 850 new products last year alone ... 300 in the sharply growing category of fresh prepared foods.

At Sainsbury, 55 percent of sales come from its own labels, including 184 wines and its "Traditional Beef," more flavorful than what is commonly sold today because it is allowed to age longer on the bone.

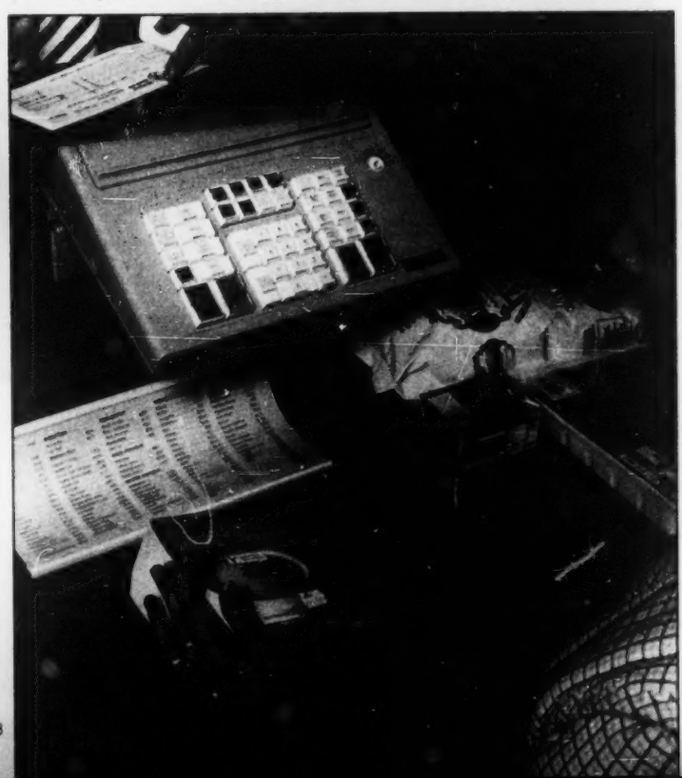
Packaging, too, is moving fast. Appropriate graphics are developed in-house for every own-label product sold, and are as sophisticated and attractive as any major marketer has ever developed.

Vacuum packs are common, especially for meat and prepared entrees. And seeing no particular payoff of operating a meat-cutting plant in every store, the British supermarket business is moving in the direction of central meat processing.

'Marketing Week' Survey Assessment Criteria

1. Quality of products/service
2. Financial performance
3. Pricing profitability
4. New products/service development
5. Development of existing products/services
6. Ability to attract, develop and keep talented people
7. Effective use of marketing in strategy development
8. Design of products/services
9. Advertising creativeness and effectiveness

Some 80 percent of all sales go through scanners—a total of 167 stores.



1988

FRESH FISH AND SEAFOOD DEPARTMENT

OPERATIONS REVIEW

Last year sales of fresh fish/seafood rose by a whopping 17%. Many retailers are setting up new or expanded departments, and the potential is great, but so are the problems.

BY DAVID LITWAK,
DIRECTOR OF RESEARCH

FISHMONGER—fish'monger'ger *n.* A trader of fish; one who deals in fish, or occupies himself with fish.

At one time, not so very long ago, most grocers would have taken umbrage at being associated with the term "fishmonger." Today, the term seems to fit a little better.

Fishmongering appears to have taken on a new sophistication when describing an activity that caters to the latest consumer trend—one that is good for business as well.

Once confined chiefly to states bordering the three

Census, Sales & Margins

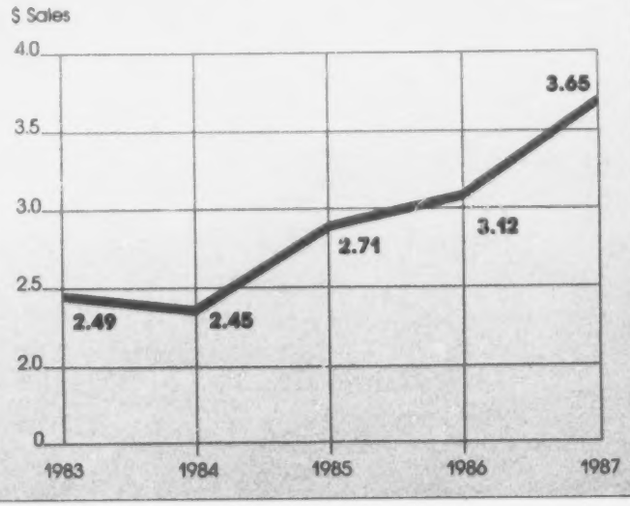
With 41% of the nation's supermarkets now selling fresh fish/seafood, sales of these products have reached an all-time high of more than $3.65 billion in 1987. Increases in product sales, through the 12,344 departments in our stores, can be directly attributed to a trend among consumers toward eating fish/seafood as part of a healthier diet.

Although exact measurements of the profitability of the fresh fish/seafood department haven't yet been made by many retailers, the section does enjoy high margins (27%), and is considered by most retailers to be a good traffic draw.

Fish/Seafood Units

Number of supermarkets selling fresh fish/seafood	12,344
Percent of all supermarkets	41%
Number of fresh fish/seafood departments opened during last 12 months	2,340

Annual Sales (billions)



Average Weekly Sales

Mean **$5,685** Median **$4,500**

Changes in Dollar Sales

(1987 vs. 1986)

Higher	91%
No change	8
Lower	0
TOTAL	100%

Average reported increase **19.8%**

Sales and Margins

Share of Total Store Sales

Mean **1.96%** Median **2.0%**

Gross Margin

Mean **26.8%** Median **27.0%**

Do You Consider Your Fish/Seafood Departments:

Traffic & image builders	43%
Both image builders & profit centers	57
TOTAL	100%

The variety of fish/seafood products that is now being offered in our units has increased dramatically.

coasts, or regions with large lakes, selling fresh fish and seafood in supermarkets has now become a nationwide event.

Today, roughly 41% of the nation's supermarkets sell fresh fish/seafood. Moreover, fresh fish/seafood is the fastest growing department, with over 2,300 units either adding or expanding departments in the last 12 months. And why not? Per capita consumption of fish/seafood reached an all-time high of more than 15 pounds in 1987, with more of it being fresh products than in the past.

With these factors in mind, SUPERMARKET BUSINESS prepared the 1988 Fresh Fish and Seafood Department Operations Review, the first comprehensive review of the sales, size and operations of this growing store department. This benchmark study measures the extent to which the supermarket industry has taken advantage of the opportunities that fish/seafood sales offer to the retailer, and also what problems retailers are having in successfully running these demanding departments.

Fish gets trendy

Remember when our mothers used to call fish "brain food?" That may well have some degree of truth to it, but scientists have shown that fish is probably "heart food." Our health-conscious society has picked up on this finding, and has taken fish very much to heart as a more important part of the basic diet. Eating light, more fish and poultry and less red meat have helped increase fish sales, especially sales of fresh fish. In 1987, sales of fresh fish/seafood rose 17% over those of 1986.

Due to the interest in nutrition and health, fish has become a trendy consumer item. This is especially true among upscale consumers. Eating fish and seafood has become the chic thing to do in many circles. The media has spread the trendy image of fresh fish/seafood by featuring young upscale people preparing and eating these products in many movies, TV shows and commercials. It is becoming commonplace for "hip" people to be seen eating fish/seafood instead of the traditional steak.

The variety of fish/seafood products that are now being offered in our units has increased dramatically. No longer is the consumer satisfied with basic flounder and sole fillets. Through continuing consumer education, and a very real evolution of the palate, the

Space & Location

High sales per square foot of space (more than $10/sq. ft.) in the fresh fish/seafood service department have made the investment in space (usually around 565 sq. ft.) very attractive to many operators.

Despite no longer being managed by the meat department, many fresh fish/seafood sections (58%) are still located adjacent to the meat department.

Size of Department

Full service fish/seafood department

Mean **565 sq. ft.** Median **500 sq. ft.**

By Store Format

Conventional	**88 sq. ft.***
Super store	**629 sq. ft.**

*Includes self-service fish/seafood departments

Sales Per Square Foot

Mean weekly sales per sq. ft.	**$10.06**

Cost Allocations

Are department costs allocated back to department?

Yes	**54%**
No	**46**
TOTAL	**100%**

Location of Department

Adjacent to meat department	**58%**
Separate from meat department	**42**
TOTAL	**100%**

Labor & Service

The service fish/seafood department enjoys a fairly low portion of sales going to pay for labor, as compared to some of the other service departments in the store. The 18% that the fish/seafood department pays in labor is the result of the average department's ability to operate with only 3.7 full-time equivalent employees. Training of employees is a particular problem for many operators when staffing fresh fish/seafood sections. Retailers are trying to combat this by setting up formal training programs (now used by 78% of companies).

Number of Employees

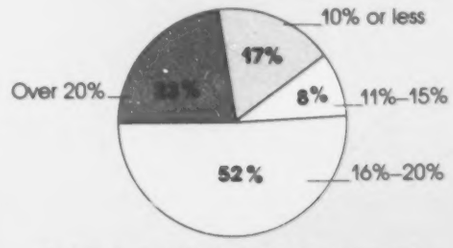
Full-time	**1.4**
Part-time	**2.5**
Full-time Equivalent*	**3.7**

*Two part-time = one full-time employee

How Much for Labor

(labor as a percent of fish/seafood sales*)

Mean **18.4%** Median **17.0%**



*Includes both service & self-service departments

Employee Training

Have formal fish/seafood training program	**78%**
No formal fish/seafood training program	**22**
TOTAL	**100%**

Who is Responsible for Training?

(includes multiple answers)

Department manager	**89%**
Corporate trainer	**59%**
Seafood supplier	**22%**

82% of companies want more help in training employees from seafood suppliers

How is Your Fish/Seafood Dept. Managed?

Management

As separate department	**79%**
As part of meat department	**18**
As part of deli department	**3**
TOTAL	**100%**

One problem that the fish/seafood department has experienced is in the area of training.

department has taken on a whole new look in terms of basic product selection.

Among last year's most often added new fish/seafood products were items like catfish, shark steaks, Alaskan scrod, octopus and buffalo carp.

Sales rise to $3.65 billion

The trend toward greater fish/seafood consumption has driven sales up to the $3.65 billion mark. Almost all units (92%) report an increase in sales of fresh fish/seafood during the last 12 months, with the average reported increase being 19.8%.

In terms of dollars, an average week brings about $5,685 into the department. This figure represents those departments that are full-scale service fish/seafood sections. Stores with only smaller self-service sections are also enjoying an increase in sales, but at a proportionally smaller scale.

Still, despite all the hoopla, fish/seafood is not a mainstay of the supermarket. According to retailers, the fish/seafood section accounts for only about 2% of the sales in those stores that have the departments. But for a department that is in a growth stage, 2% is a very significant share of the store.

As for profit, the potential definitely exists within the fish/seafood department. The reported average gross margin for the department is 26.8%.

Retailers, though, are mixed in their opinion of the current profitability of their departments. Of the companies responding, 43% considered their fish/seafood department to be primarily image and traffic builders, with the remaining 57% considering the department to be both image builders and profit centers.

The fish/seafood section is also a relatively high-rent piece of real estate. The average service fish/seafood department is roughly 565 square feet in size. A department this size generates average weekly sales of slightly more than $10 per square foot. Therefore, sales per square foot in fish/seafood are about 60% greater than those in the deli, and almost three times as much as in produce.

Is fish meat?

The old notion of fish being a subspecies of fresh meat appears to have changed. While the fish/seafood department is still more likely to be located adjacent to the meat department (in 58% of units), the management is now different. Reportedly, 79% of all fish/seafood departments are under their own, separate management at store level. About 18% are still managed by the meat manager, with the remaining 3% falling under the jurisidiction of the deli department.

The logic behind separate seafood management is clear. Since the department has expanded far beyond the three or four meat case slots to include a wide variety of products, many still alive, some that are prepared, there is a need for management that has specific expertise in the product and its maintenance. An expert in meat is not usually an expert in fish.

As with any service department, labor is a crucial factor in the success of a fish/seafood department. The average section employs just under the equivalent of four full-time employees (with two part-time employees counting as one full-timer).

It costs the average fish/seafood department about 18% of its total sales to pay for this labor. As service department labor costs go, this is a good figure. The deli's labor costs run about 23%, while the instore bakery can spend as much as 33% of its sales on labor.

Training poses problem

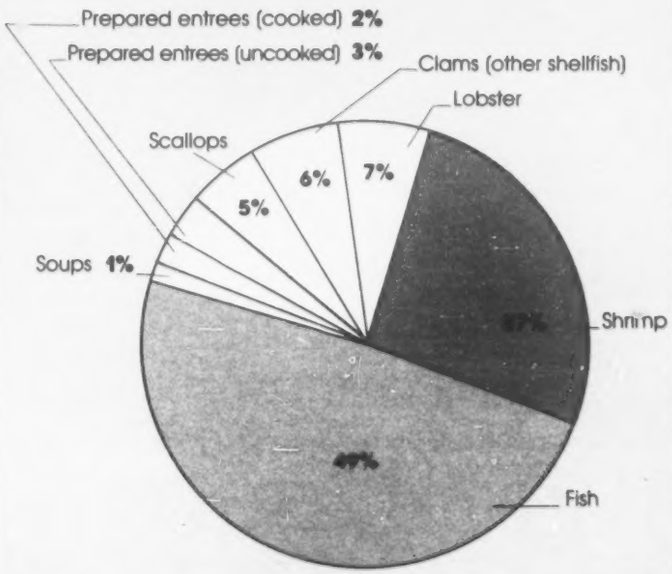
One problem that the fish/seafood department has experienced is in the area of training. Any service department requires trained employees, but fish/seafood is a little different because of the nature of the product. Fish/seafood is highly perishable and must be constantly maintained to avoid color changes, hardening and acquiring odor.

Quality maintenance has always been a problem for retailers getting into fresh fish/

Product Mix

With fish and seafood, as with most food products these days, fresh is more desirable than frozen. More than three-quarters of the fish/seafood sales come from items sold fresh as opposed to frozen. Lobsters, because of their particular characteristics, are sold live by almost all of the stores (98%) that carry them. Many companies (48%) now offer customers the option of instore cooking of lobsters that they purchased live. When it comes to fresh, lobster cooked instore is as fresh as you can get.

Portioning Out the Fish/Seafood Sales Dollar



How Do You Sell Lobsters?

(Includes multiple answers)

Percent of companies	
Live	98%
Sell live & then cook in store	48%
Frozen	37%
Prepared before purchase	22%
Refrigerated	15%

Fresh vs. Frozen

Percent of fish/seafood sold	
Fresh	77%
Frozen	23%
TOTAL	100%

Fish/Seafood Items Most Often Added Last Year

Catfish
Live Lobsters
Shark Steaks
Sea Legs

When it comes to the department's product mix, fish is still the king.

seafood for the first time. The problem is magnified as the distance from the source of the seafood increases.

Some varieties of seafood are also highly susceptible to contamination. Between 1978 and 1984 more than 5,000 cases of seafood-borne illness were reported to the Center for Disease Control. And, of these cases there were five known deaths.

The growing popularity of fish/seafood since 1984 magnifies the risks of seafood-borne illness, especially since there is generally less rigorous government inspection of fish/seafood than of fresh meat. These potential problems must be addressed through proper employee training.

Most retailers (78%) have taken steps to develop a formal training program for their fish/seafood employees. The other 22%, do not, as yet, have any formal training.

Whoever actually does the training, the vast majority of retailers (82%) felt that they needed more in the way of training support and help from their suppliers. This is especially true of those retailers who are new to the marketing of these products.

If there is one characteristic that sets many of our fish/seafood departments apart from other service sections, it is that fish/seafood is the only section in the store that carries products that are still capable of moving around on their own power.

Live animals, whether they be lobsters, crabs, or fish, have a very different set of maintenance criteria than their deceased cousins. Again, training is critical to the success of a live fish or lobster program, especially since "live" is usually a very good way of drawing store customers to the fish department, where impulse buying can take over. Many a shopping cart has been "parked" in front of a lobster tank, with the crustacean acting as a temporary babysitter for the toddler riding inside the cart.

Fish tales

When it comes to product mix in the fish/seafood department, fish is still the king. Virtually half of all the money taken into the department comes from the sale of plain fish, whether it be whole, filleted, or in steaks. A distant second is the sale of shrimp, which accounts for 27% of department sales. All the other products, including lobster, account for less than 25% of sales.

Convenience has even found a place in the fish/seafood department. As with most other store sections, customers want quick, convenient foods from the fish/seafood department.

Once the independent specialty fish store's chief weapon in combatting competition from supermarkets, prepared fish/seafood dishes have been adopted as a weapon in the supermarket's arsenal.

Prepared meals a boon

With the customers' craving for healthy fish meals being coupled with their demand for quick meals, convenient shopping and the inexperience of many segments of the population in preparing fish/seafood, it was inevitable that smart operators would start to provide prepared fish/seafood meals. Even though prepared dishes (both uncooked and fully prepared) still account for only 5% of department sales, their popularity is increasing rapidly.

Many of the prepared dishes are available in single self-service packages. As a matter of fact, about 10% of all service fish/seafood department sales come through self-service.

If the department has a problem, other than a shortage of quality suppliers and general industry expertise, it is in attracting customers.

Currently, only about four out of every 100 store customers make a purchase from the fish/seafood section. This is, hopefully, a problem that will start to subside as more consumers jump on the fish bandwagon, and begin to feel more comfortable with preparing and eating fish and seafood. It's an educational process that has to take place with consumers in many parts of the country, much as was necessary in service delis 10 years ago.

One of the bright and sustaining spots in the fish/seafood department is the average transaction figure. The average department patron spends $4.82 on each transaction. This figure is high enough to account for $3.65 billion, by just 4% of store traffic. With per capita consumption of fresh fish and seafood growing each year, the future for supermarkets looks extremely upbeat. ■

Merchandising, Customers & Supply

Self-service items, mostly prepared dishes, account for about 10% of the sales generated by service fish/seafood sections. These items help the supermarket fish/seafood departments compete successfully with independent dealers.

The overwhelming majority of fish/seafood comes into the store from a specialized fish/seafood supplier. Only about 2% of the product supply comes through grocery wholesalers, or other sources. Other than those items that are sold whole, most of the fish/seafood products (83%) come into the store precut.

How Customers Spend

Percent who shop fish/seafood dept.

Mean **4.4%** Median **6.0%**

How Much They Spend

(per transaction)

Mean **$4.82**	Median **$5.00**
Under $3.00	**8%**
$3.01-$4.00	**30**
$4.01-$5.00	**22**
$5.01-$6.00	**27**
Over $6.00	**13**
TOTAL	**100%**

Service vs Self-Service

(In service fish/seafood depts)

Percent of sales through

Service	**90%**
Self-service	**10**
TOTAL	**100%**

Supply

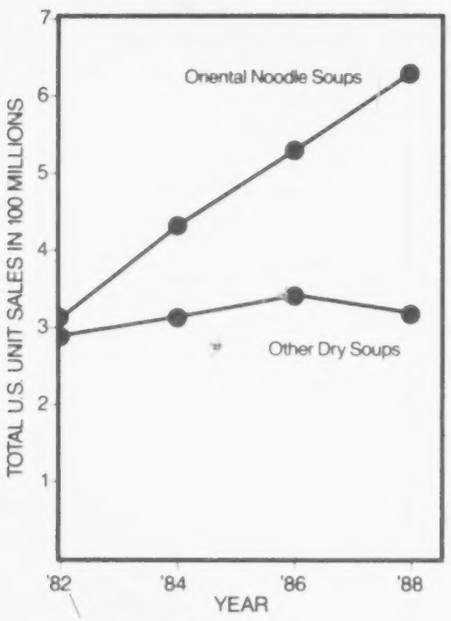
Percent of fresh fish/seafood bought from:

Specialty fish/seafood wholesaler	**98%**
Other (including grocery wholesaler)	**2**
TOTAL	**100%**

How fish/seafood comes into the store:

Precut & portioned	**83%**
Whole	**17**
TOTAL	**100%**

The Orient Express.



Nissin Foods is rolling full steam ahead.

The oriental noodle soup category, led by Nissin, has experienced an astonishing 109% increase over the past six years. Meanwhile, all other dry soups remained virtually stuck in their tracks, as oriental noodle soups outsold them 2 to 1.

That means having Nissin products on your shelves provides you with a faster turnover and higher profits. And the introduction of new Hearty Cup 'O Noodles will assure you of continued sales success.

So climb on board the Orient Express. Because as you can see, Nissin soups make others look like a wet noodle.

nissin

MINDING THE STORE

Continued from page 36

ready-made experience on the leading edge of retailing technology ... all of which have marketing implications to one degree or another.

A multi-faceted marketer

What provides the marketing momentum? As always and everywhere, nothing more than people with a sense of mission.

What the major U.K retailers are achieving mirrors what Great Britain itself has achieved since the early 1980s, when its moribund economy was producing a crisis of confidence as well as of cash flow ... and the once-proud subjects of the British Crown were beginning to perceive themselves as every foreigner's poor relation.

Today, with unemployment down and the economy up, the pride is palpable ... and nowhere more so than at J. Sainsbury.

Indeed, *Marketing Week*'s top title is not the only honor the company has won recently—perhaps not even the most significant. For in a *London Times* poll published in March, J. Sainsbury came in first among all U.K. companies in "ability to attract and retain high-calibre employees."

Now, that's something ... and it, too, is called *marketing*. ■

David Sainsbury

R.A. Clark

THE BRITISH ARE COMING

Continued from page 31

recently made. So pleased is Tesco with the result that it plans additional joint ventures with M&S at Camberly, Surrey and Handforth, South Manchester.

Overseas growth plans?

And what of overseas ventures? Does Tesco, like Sainsbury and partner Marks & Spencer, have an interest in the U.S. market?

Says MacLaurin: "We've got more than enough to do here right now. But as a U.K. company, we're going to be looking toward world retailing—to be any good in the future, that's what it's going to take over the next 15 years."

The successful companies of the future "are going to develop world trade, and have interests in each others' countries," he adds.

"Obviously, Tesco is very much interested in that—in moving out from a very strong base here to the U.S., the European Economic Community, or to the Pacific Basin."

Of Tesco's possible future entry into the U.S., MacLaurin says: "Ideally, what we'd like to do is work with a good U.S. company. We've looked at the American market, and we admire a number of American operators. We'd like to have an interest in a company, but not necessarily a majority interest. We'd rather work with a company, and develop insight into the market."

That low-key approach, he says, stems from Tesco's experience of buying a company in southern Ireland and attempting to run it from home: "It didn't work, because we didn't understand the market.

"It's very presumptuous to go into a foreign market, and think that everybody is going to start doing things your way."

And if they did, heaven help you. ■

SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 6/17/88	4 WEEKS ENDING 7/15/88	4 WEEKS ENDING 8/12/88
Baby Powders	- 4.8	- 3.2	+ 5.3
Baby Oils, Creams & Lotions	+14.4	+ 4.0	+ 1.9
Infant Clothes	-12.1	-12.2	-12.6
Nursing Supplies	- 0.3	+ 2.4	- 0.2
Sprays	- 3.5	- 4.8	- 2.5
Roll-Ons	+ 3.0	- 1.7	+ 3.4
Stick Deodorants & Pads	+ 5.7	+10.5	+ 7.1
Creams	-14.0	- 7.8	- 6.1
Deodorants & Talcum Powders	+ 7.1	+15.1	+ 3.1
Feminine Hygiene Deodorants	+63.8	+44.1	+37.5
Foot Deodorants & Athlete's Foot Remedies	+13.4	+ 8.8	+ 8.6
Feminine Douches	+11.1	+12.7	+ 8.2
Antiseptics	+ 6.1	+ 2.3	+ 4.6
First Aid Products	- 1.5	- 3.3	- 1.4
Shampoos	- 5.5	- 2.5	+ 2.4
Hair Sprays	+18.2	+14.7	+13.7
Hair Conditioning Rinses	+ 5.5	+ 8.4	+11.8
Hair Setting Needs	+ 0.1	+ 0.3	+ 4.0
Home Permanent Kits	- 7.2	-14.6	- 6.0
Hair Coloring	+ 3.9	+ 2.0	- 0.1
Hair Dressing Needs	- 8.9	- 6.1	- 7.5
Toothpastes & Powders	+ 4.5	- 3.9	- 5.9
Mouthwashes	+16.5	+11.1	+ 7.0
Breath Fresheners	+ 2.1	- 1.0	+ 2.0
Denture Cleaners	- 0.2	- 1.4	+ 0.3
Denture Adhesives	+ 3.1	+ 4.7	+ 0.8
Toothbrushes	+ 9.5	- 1.2	+ 4.9
Dental Aids	+22.6	+ 2.8	+ 0.2
Antacids	- 0.2	+ 2.1	+ 1.8
Internal Analgesics	+ 2.9	+ 1.2	- 0.4
External Analgesics	- 7.1	- 2.2	- 2.3
Cold Remedies	+16.1	+15.1	+ 8.8
Nasal Sprays - Drops - Inhalers	+ 7.9	+ 5.7	+ 0.5
Chest Rubs	+10.8	+ 5.9	- 5.0
Cough Remedies	+10.5	+ 5.4	- 0.3
Laxatives	+ 6.8	+ 8.7	+ 6.5
Sleeping Aids	+ 2.8	- 2.6	+ 1.7
Tranquilizers	- 7.7	- 9.7	- 7.9
Synthetic Vitamins	+ 3.9	+ 8.1	+ 0.3
Eye Care Products	+ 9.3	+ 5.5	+ 7.6
Appetite Suppressants	+22.5	+15.1	+15.3
Shaving Creams	- 6.6	+ 3.5	- 2.2
Pre-Shave Lotions	- 1.8	+ 1.5	- 4.6
After-Shave Lotions	- 1.1	+ 4.8	- 2.1
Razor Blades	- 0.8	- 3.0	+ 0.5
Razors & Blades	+10.7	+11.0	+ 8.5
Hand & Body Creams & Lotions	+15.1	+12.2	+17.2
Facial Preparations	+12.6	+14.2	+10.0
Lip Care Products	- 0.5	+ 2.7	- 5.0
Suntan Lotions & Oils	+21.4	+24.9	+22.8
Cosmetic & Medicated Skin Aids	+ 2.3	- 0.4	+ 2.2

HBA Growth Rate Slows During August

Weakness in high-volume dentifrice, internal analgesics and cough remedies categories reduces growth rate vs. year ago.

BY ALAN MILLER JR.

During much of this year food store sales of health and beauty aids products have been outpacing the food departments in growth over the levels achieved in corresponding 1987 reporting periods. However, in the past two periods tonnage trends of shelf stable and frozen foods have been showing strong increases, while the gain for health and beauty aids was about the same as refrigerated foods (+ 2.2%) but higher than dry grocery: nonfood (+ 1.4%).

Part of the HBA slowdown can be attributed to a dearth of important new products in high-volume categories. However, during the four weeks ending August 12, 1988, there were a handful of new product introductions that may contribute to higher growth rates during the late summer and autumn reporting periods. These include Mennen Speed Spray and Lady Speed Spray Antiperspirants, Faberge's Just Wonderful Shampoo and Hair Conditioning Rinse, Gillette's Dippity Do Hair Spray and Beecham's Calgon Hand & Body Cream & Lotion. These products first appeared during the August reporting period, but had not yet gained national distribution.

There was a four-week gain of just over 6 million units in the 52 health and beauty aid categories tracked by SAMI in both food stores and drugstores in 54 major markets combined. This gain translates to an increase of 2.3%, slightly less than the 2.5% gain during the preceding period. During this same period, ending on August 12, poundage of shelf-stable foods rose 4.4% and the increase among frozen foods amounted to 4.1%. Unit volume in all five product departments combined was 3.4% higher than the similar year-ago level. On a retail dollar reporting basis, the 6.1% increase for health and beauty aids was exceeded by dry grocery: food items (+ 7.7%) and frozen foods (+ 7.4%).

Did drought contribute?

Some of the gains in the food sector may have been the result of price increases passed along to the consumer attributable to the severe drought conditions in much of the farm belt. (SAMI will soon issue a comprehensive report on the effects of the drought on food prices.)

There were six HBA product groups exhibiting unit volume gains over last year and two with loss rates. This performance compares with gains for five groups and losses for three in the period ending in mid-July. The ratio of gains to losses among product categories was the same in both reporting periods—34 to 18.

The best record for the product groups was the 8.8% increase for skin care aids and the 6.0% improvement among hair care needs. The product group losses were found in the oral hygiene (-1.7%) and shaving needs (-0.4%) product groups. The highest product category gain rates were established for feminine hygiene deodorants (+ 37.5%), suntan lotion-suntan oil (+ 22.8%), hand & body creams/lotions (+ 17.2%), appetite suppressants (15.3%) and hair spray (+ 13.7%). The most important category loss was the 5.9% drop in the toothpaste and powder category, which had been inflated in the year earlier period by a proliferation of new anti-tartar/plaque items.

Comeback for baby powder

The most important change in trending among baby needs items was the recovery in the baby powder category from a long-term slump. Four-week volume increased 5.3%, which compares favorably with the 6.7% loss rate on an annual basis. Baby oils, creams & lotions, however, did not per-

form as well as these items have during recent months. The four-week gain of 1.9% is in contrast to an increase of 6.7% for the 12 weeks and 11.0% for the full year. Sales of nursing supplies were down, just barely, during the four-week span while movement of infant clothes fell by 12.6%, or about the same as the 12.3% drop during the 12 weeks.

In the personal deodorant product group, which enjoyed a 4.3% gain in four-week unit volume, there were two categories with losses—spray deodorants (-2.5%) and cream deodorants (-6.1%). These categories also displayed downward trends for both the 12-week and 52 week periods. The only category to show a higher gain rate for the most recent four-week period vs. the 12-week span is the 3.4% four-week gain for roll-on deodorants, which is higher than the 1.6% increase on a 12-week basis. The 37.5% gain for feminine hygiene deodorants can be importantly attributed to a new Massengill entry. Continuing strong four-week improvement was found in stick deodorants (+7.1%), foot deodorants and athlete's foot remedies (+8.6%) and feminine douches/washes (+8.2%).

There was an improvement in the four-week trends of both first aid categories in relation to the 12-week performance. The four-week gain for first aid antiseptics amounted to 4.6%, or slightly more than the 4.3% increase during the 12 weeks. The four-week loss of 1.4% for first aid products (gauze, bandages, cotton swabs, etc.) was modestly better than the 2.1% 12-week dip.

Gains for hair sprays

In the hair care needs product group, where a strong 6.0% four-week gain was recorded, the best performance came from the four categories with the highest unit sales. Losses were found in categories with lower volume in terms of unit sales. There were double-digit rates of increase for both hair spray (+13.7%) and hair conditioning rinses (+11.8%). Shampoo sales rose 2.4% during the four weeks in contrast to a loss of 2.5% in the preceding period. Sales of hair setting needs rose 4.0% in the August period, a substantially higher growth rate than the +0.3% established in the July period. Sales of hair coloring items were only slightly below (-0.1%) the year-ago figure, while sales of home permanent kits and hair dressing needs continued to exhibit downward trends. Both of these latter categories show losses on an annual basis, amounting to 10.8% in the case of home permanent kits and 6.4% for hair dressing needs.

Of the seven oral hygiene categories tracked by SAMI, the only four-week loss rate was the aforementioned decline of 5.9% in the toothpaste and powder category. However, there were three categories that were just barely in the plus column: denture cleaners (+0.3%), denture adhesives (+0.8%) and dental aids (+0.2%). The best performance was turned in among mouthwashes, where a four-week gain of 7.0% was registered. New products have played an important role in this gain, particularly coming from Colgate Tartar Control, Crest Rinse (in test) and N'Ice. Toothbrush volume rose 4.9% during the four weeks, helping to erase a deficit on a full 52-week basis, which now stands at -0.1%.

Nine of the 14 categories of proprietary remedies had volume gains, leading to a 2.0% four-week increase for the entire product group. However, this was just about half the growth rate achieved by these over-the-counter products during the preceding four-week period.

Contributing to the slowdown were negative trends in the high-volume categories of internal analgesics (0.4%) and cough remedies (-0.3%), both of which were in the plus column in the mid-July period. As noted earlier, appetite suppressants are riding high (15.3%) and these products also show an impressive gain for the full year (15.6%). Cold remedies had a reduced gain rate in mid-August, but the 8.8% increase is impressive considering that new products have not been instrumental in expanding the category volume. Chest rub movement fell 5.0%, but this is not a serious loss during a mid-summer period. Eye care products (+7.6%) are still on the upsurge and both natural (+7.8%) and synthetic vitamins had increased sales. Sales of sleeping aids returned to the gain side of the ledger, erasing a loss in the preceding period. Laxative and stool softener volume remains significantly ahead of the 1987 pace.

Reversal for shaving needs

Three of the shaving needs categories that had displayed growth in the preceding reporting period experienced declines in the four-week period under scrutiny. Shaving cream sales were 2.2% below the 1987 level while both pre-shave lotions (-4.6%) and after-shave lotions (-2.1%) were in arrears. There was a modest (+0.5%) increase in the high-volume razor blades category and a more substantial rate of increase (+8.5%) in the razors and blades category. For the full year, the: are unit volume losses in three of the five categories of shaving needs: pre-shave lotions (-0.3%), razor blades (-2.2%) and razors and blades (2.2%). Annual volume was slightly higher in the case of shaving creams (+1.6%) and after-shave lotions (0.6%).

The product group with consistently higher growth is the skin care aids group of catego-

Continued on page 66

PROFIT NEWS

★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★★

The highest DPP in feminine hygiene

With over 150 items in the Feminine Hygiene category (including tampons and napkins), it can be hard to make decisions about shelf space allocation and merchandising programs. Now DPP—Direct Product Profit—makes it easier.

According to a recent study,* Summer's Eve Feminine Wash has one of the *highest DPP per square foot* of any item in the

Hygiene category. And the *highest DPP per week per SKU.* Our new product, Feminine Mist, is fast becoming a winner too.

We're supporting our high DPP with intensive promotions and advertising. So if you want to maximize profits, make the most of Summer's Eve.

*Willard Bishop Consulting, Ltd.

SAMI UPDATE

Continued from page 64

ries. Only lip care products (-5.0%) is currrently recording rates of decline, although these products are 7.0% higher for the full year. The four-week gain for hand and body creams and lotions amounting to 17.2% is higher than the trend for the 12-week (+ 14.8%) or 52-week periods (+ 12.2%).

Facial preparations show double-digit rates of growth for both for the four- and 12-week intervals, in contrast with an increase of only 3.9% for the full year. The gains for suntan lotions and oils, aided by skin cancer warnings and focusing on the benefits of sunscreens, occur during the peak summer months in which the lion's share of the annual business is attained. Sales of cosmetic and medicated skin aids are currently advancing at a slower rate than is found looking at the full year growth rate of 5.2%.

HBA food vs. drug

National unit sales of health and beauty aids products tracked by SAMI are currently running stronger in food stores than in drug outlets. During the August 12, 1988, four-week reporting period there was a loss of 0.5% for all 52 categories combined in drugstores as compared to a 2.3% gain among all food stores. In the drugstore universe there were only three product groups with gains: baby needs (+ 1.0%), oral hygiene (+ 0.5%) and shaving needs (+ 8.3%).

Drugstores had reduced four-week volume in the two product groups with the highest gain rates among food stores. Drugstore movement for skin care aids was 3.7% below the level during the corresponding year-ago period, and there was a drugstore loss of 0.2% for hair care needs compared with a 6.0% gain among food stores.

However, there were a number of categories in which drugstore four-week performance was superior to the food store trend. Nursing supplies enjoyed a 5.5% gain in drugstores, but fell 0.2% in food stores.

Drugstore volume of toothpaste and powder was 0.5% ahead of last year's level, whereas food store sales trailed the 1987 corresponding period level by 5.9%. Internal analgesics were 1.6% ahead in drugstores, but were 0.4% behind in food stores.

In the shaving needs product group, both shaving creams and after-shave lotions attained gains among drugstores as opposed to loss rates for food stores. Razor blade sales rose an impressive 14.7% in drugstores compared with a lackluster half a percentage point increase for food stores.

In the majority of categories the food store performance is better than the trends among drugstores. The differences between outlets can be even more substantial on a market-by-market basis. ■

WARM-UP FOR NHMA'S "CUSTOMERS' SHOW!"

Personal planning and getting advance input from others assures productivity.

NHMA asked renowned trade show consultant Dr. Allen Konopacki, President of Incomm International, to advise both its members and their customers on how to maximize their productivity at Housewares Shows. This is a part of what he had to say to buyers.

Number 1 in a series

Here's how to get ready for the 89th NHMA International Housewares Exposition.

1) Start thinking now of the right questions to ask each of the Exhibitors you visit. Walking in cold and asking, "What's new" or "What's moving," may not always get you all of the information you need.

2) Work out specific "What if" questions in advance like, "If *my* Company is planning a special Fall promotion, what can I expect from *your* Company?" 60% of getting good answers is asking good questions.

3) Involve others in your Company in your warm-up process. Successful companies and executives depend on all of their associates to provide input on competition, service, performance and new opportunities.

One, two, three simple points. But so important. When you warm up first, you'll use your time better and return with more. See you at the Show!

89TH NHMA INTERNATIONAL HOUSEWARES EXPOSITION
JANUARY 15-18, 1989
McCORMICK PLACE • CHICAGO, ILLINOIS

NHMA

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